

Through the Gate Transfer Study

Phase 2 Technical Report



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for California Community Colleges

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Prepared by:

Katie Brohawn, PhD

Kelley Karandjeff, EdM

Alyssa Nguyen, MA

Darla M. Cooper, EdD

Kristen Fong, PhD

Andrew Kretz, PhD

Rogéair D. Purnell, PhD

Diane Rodriguez-Kiino, PhD

Priyadarshini Chaplot, MBA

Kay Nguyen, EdD

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Introduction

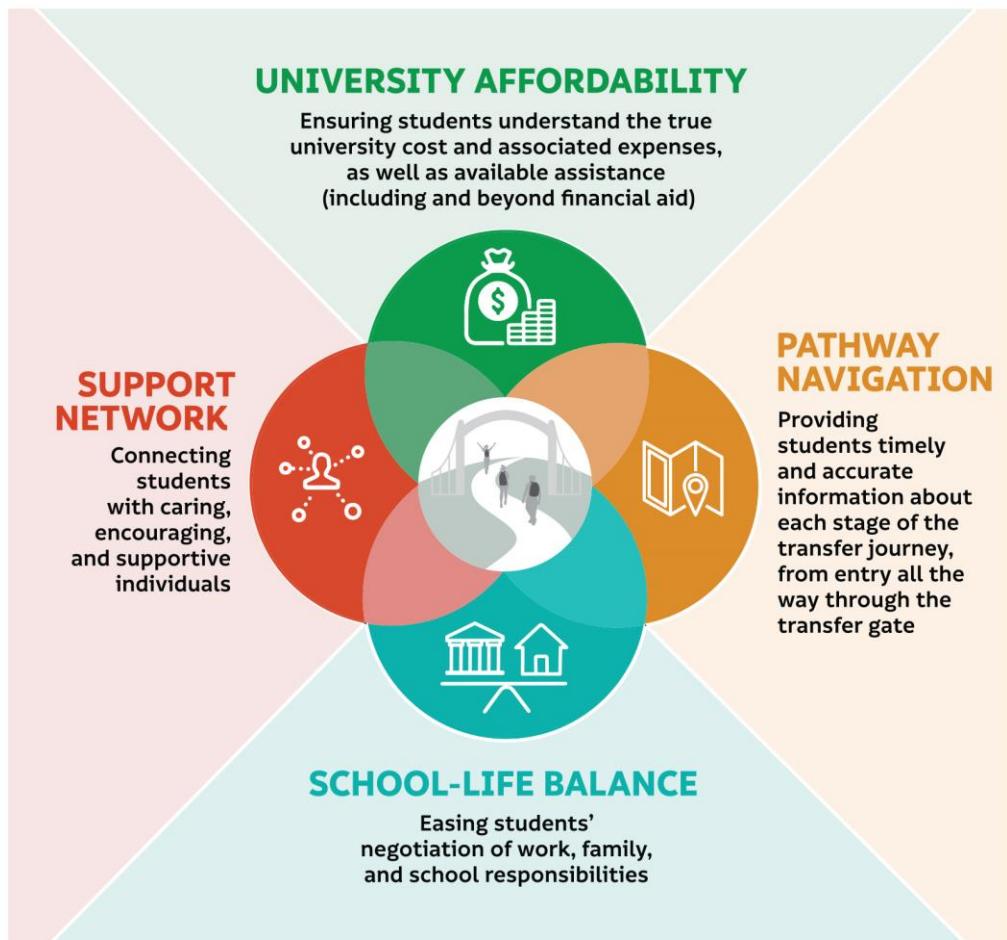
There is documented need for California to produce more bachelor's degree holders (Johnson, Cook, & Mejia, 2017). Broad agreement exists that boosting community college transfer is an essential strategy for achieving this critical goal, while at the same time closing equity gaps and promoting mobility for residents of a state plagued with the nation's highest cost of living (Handel & Williams, 2012; Bustillos, 2017).

In 2016, the Research and Planning Group for California Community Colleges (RP Group) launched the *Through the Gate* transfer study, aimed to identify strategies for increasing transfer among "high-leverage learners" in the California Community Colleges (CCC)—individuals who have completed all or most of their transfer requirements, but who do not make it "through the gate" to a university (see *Through the Gate* Transfer Study Overview, p. 34). Phase 1 of *Through the Gate* included quantitative research to understand the transfer landscape and identify where our state is suffering the greatest transfer leaks, determining (1) how many students in California arrived at the transfer gate, but did not go through; and (2) who they are and where they reside. This analysis revealed that over a recent five-year period, nearly 300,000 California community college students who demonstrated the determination and academic ability to transfer did not make it to university (Cooper et al., 2017). Further, Phase 1 identified factors that influenced the likelihood that a student would reach the transfer gate, including race/ethnicity and geographic location (Cooper et al., 2019).

Building off the wealth of knowledge gained during its first phase, Phase 2 of *Through the Gate* set out to answer the following question: **For students whose course-taking indicates they are close to the gate, which factors are most salient as they decide whether or not to transfer to a university?**

Students Speak Their Truth about Transfer: What They Need to Get Through the Gate (Cooper et al., 2020) summarizes the core findings from the second phase of this work. Surveys and interviews with over 800 students from 31 California community colleges indicate that **transfer students need colleges and universities to provide a more holistic and integrated approach** to ensure they reach their goals: a bachelor's degree and economic mobility for themselves and their families. In this report, we articulate a new student transfer capacity-building framework inclusive of four key, interconnected factors (see Figure 1 on the next page).

Figure 1. Student Transfer Capacity-Building Framework



Reader's Guide

This technical report provides additional detail on the Phase 2 research highlighted in *Students Speak Their Truth about Transfer: What They Need to Get Through the Gate* (Cooper et al., 2020). This report begins with an overview of the methodology for this phase, including (1) the sampling methods used to arrive at the two main sources of data (the survey of 809 students across 31 colleges and interviews with a subset of 39 survey respondents), and (2) our approach to these two components of the research. Then, we summarize the survey and interview findings, including a presentation of the demographics and key characteristics of participants, an outline of transfer motivators and challenges impacting student transfer, a discussion of sources tapped to navigate the transfer journey, and a list of advice from student interviewees to their colleges for improving transfer policies and practices. Following this, we outline the research limitations and then summarize the conclusions from this project phase.

The RP Group anticipates that educators, executives, and system-level leaders in the state's community college and university systems can glean insights from both phases of the *Through the Gate* study—informing equity-focused transfer initiatives and Guided Pathways development. Institutional research, planning, and effectiveness (IRPE) professionals may find this report particularly useful for transfer-focused inquiry, data collection, analysis, and dialog with campus student success and institutional redesign teams.

Phase 2 Methodology

The study employed a mixed-methods approach that included both quantitative and qualitative data and analyses. The primary sources of data for this project phase included a comprehensive online survey targeted towards students identified as “at” or “near” the transfer gate and in-depth follow-up telephone interviews with a subset of survey participants. For the purposes of this research:

- **At the Gate (ATG) students** obtained an Associate’s Degree for Transfer (AD-T) or earned 60 or more transferable units, maintained a 2.0 GPA, and successfully completed transfer-level math and English, and had not yet transferred; and
- **Near the Gate (NTG) students** earned 60 or more transferable units, maintained a 2.0 GPA, but had not successfully completed their transfer-level math/English requirement, and had not yet transferred.

The intention of the survey and interviews was to understand the specific experiences and perspectives of students as they prepare to transfer, given the limited prior research on this unique, high-leverage transfer population. The survey aimed to parse out a taxonomy of factors—grouped at the student (e.g., psychosocial – sense of belonging) versus college (e.g., transfer culture and supports) levels—impacting whether or not students who have made significant progress toward transfer decide to make the transition to university (see Appendix A). The research team constructed the survey drawing upon the existing literature on students who achieved transfer to a university, in alignment with our Phase 1 findings, and in consultation with a wide variety of community college practitioners, most of whom work directly with students seeking transfer.

Then, we conducted interviews to offer context to the factors emerging through the survey findings, provide in-depth understanding about students’ decision-making patterns, and discern any differences between the choices and experiences of students who stopped at the gate compared to those who stopped near the gate.

A Shift in Research Question and Approach

As stated above, Phase 2 intended to answer the following research question: For students whose course-taking indicates they are close to the gate, what factors are most salient as they decide whether or not to transfer to a university?

Once we analyzed the over 800 survey responses and nearly 40 interviews in this second phase, it became apparent that the original research question and methodological focus on *transfer decision-making*, that is what factors impacted whether or not students *wanted* to transfer, required revision. The vast majority of participants indicated a desire to transfer. However, a set of complex factors influenced their successful transition through the gate. In turn, the research team shifted to examining: **What factors impact students' transfer capacity when they are so close to the gate, and what helps this high-leverage student population make the transition to university?** Ultimately, this research revealed a framework for building students' *transfer capacity*, identifying the factors *impacting both their actual and perceived readiness for university*, as identified in Figure 1 (p. 5). We reference this framework and its four factors throughout the rest of the report.

College Selection

We based the study on a sample of ATG and NTG students from the California Community Colleges (CCC). We used the following criteria to identify and recruit colleges enrolling students with broad and diverse transfer experiences:

1. CCC Location

- *CCC macro-region*: prioritized all CCC in the Central Valley/Mother Lode and Inland Empire/Desert regions (more rural areas), and invited a subset of CCC from the five other regions (Los Angeles/Orange County; Northern Coastal Inland; San Diego/Imperial; Santa Cruz/Monterey Bay/Silicon Valley/East and North Bay; and South Central)

2. CCC Size

- *Fall 2016 unduplicated headcount*: examined headcount to balance the size of the institution based on credit student population

3. Associate Degree for Transfer (ADT) availability and awards

- Number of ADTs offered at the college
- Number of ADTs awarded between 2014-2015, 2015-2016, and 2016-2017

4. Underrepresented student populations

- Fall 2016 student characteristics
 - Proportion of African-American/Black students
 - Proportion of Hispanic or Latina/o/x students
 - Proportion of White students

5. Transfer outcomes for underrepresented student populations

- *Transfer velocity rates:*¹ examined six-year transfer rates for three cohorts (2006-2007, 2007-2008, 2008-2009)
 - Overall rates
 - Rates for African-American/Black students
 - Rates for Hispanic or Latina/o/x students

6. Transfer options

- Distance in miles from nearest public university (University of California (UC) or California State University (CSU))

We identified and recruited 43 colleges to participate. We contacted each college's president and lead institutional researcher with an invitation for involvement in this phase of the study, including a draft data-sharing Memorandum of Understanding (MOU) and offering them a survey result summary from their specific college as a benefit for their participation. Through this outreach, 31 colleges² agreed to participate. Once we secured the MOU, a *Through the Gate* team member worked closely with college personnel to identify the specific population for the online survey and transmit the data.

Survey Methodology

Survey Sample and Recruitment

Between November and December 2018, the participating colleges submitted files through secure protocols containing demographic and contact information for students who met the following criteria:

ATG and NTG students who were enrolled between spring 2013 and spring 2018...

- Who had exited the college as of fall 2018, **and**
- Who were still enrolled at the college during fall 2018

In total, this file submission resulted in a study population of 187,018 students. From this study population, we then sent the survey (using a combination of email invitations and text messaging) to a quasi-random sample of 39,651 students—intentionally oversampling the ATG student population. We applied the same sampling logic to each of the 31 colleges. Note: for any college with fewer than 30 students, we included the entire population from that college in the sample. We based the methodology on an assumption of a 5% response rate, with a split of

¹ https://datamart.cccco.edu/Outcomes/Transfer_Velocity.aspx

² <https://rpgroup.org/Through-the-Gate/Participating-Colleges>

75% ATG and 25% NTG between the enrolled and exited groups. We notified students participating in the survey that they would be entered into a raffle for a chance to win one of 50 \$100 Amazon gift cards for their participation.³

Survey Variables and Data Analysis

Ultimately, we achieved a 4% survey response rate, with 1,596 students responding out of the 39,651 invited to participate. The survey started with a series of branching questions to identify where students were in their transfer journey. Participants chose from five transfer status options, as identified in Table 1 below.

Table 1. Number and Percent of Original Survey Respondents by Transfer Status

Transfer Status	n	%
Already transferred	766	48.0
Actively planning to transfer	614	38.5
Still deciding if want to transfer	167	10.5
Considered transfer at some point, but decided not to	28	1.8
Never intended to transfer	21	1.3
Total N	1,596	100.0

The survey then immediately filtered out and directed students who had already transferred or never intended to transfer to a page thanking them for their time and participation. The remaining **809 students in the final survey sample** (those who were actively planning to transfer, still deciding if they wanted to transfer, or had considered transfer at some point but decided not to) **then navigated a series of questions designed for an in-depth exploration of motivators, challenges, and supports** impacting their transfer experience. These questions aligned to the student- and college-level variables discussed in the opening to this Phase 2 Methodology section (see p. 6).

Survey analyses were predominately descriptive in nature. We first created a complete respondent profile, ensuring the 809 survey respondents did not differ significantly with respect to key demographics (i.e., gender, race/ethnicity, financial aid status, age) when compared to the entire study population. We followed this step with a full descriptive analysis of responses, first examining the final survey sample as a whole, then breaking out responses by the transfer status indicated above in Table 1 as well as by region.

Note that in the results section of this technical report, data are presented in the order in which the survey asked the questions as opposed to grouping questions by the four factors for building students' transfer capacity, as these factors were only determined *after* we completed the survey analyses. At the same time, we use the key in Figure 2 on the next page to identify which factor we ultimately associated with a given question.

³ Note: For both the survey and phone interviews, students received detailed information about the study and then provided their informed consent prior to participation.

Figure 2. Student Transfer Capacity-Building Framework Factor Key



Interview Methodology

Interview Sample and Recruitment

We drew the pool of potential interviewees from the survey respondents who were actively planning to or still deciding about transfer.⁴ At the end of the survey, we invited survey respondents to indicate if they were interested in participating in a 30-minute telephone interview and offered an additional incentive of a \$50 Amazon gift card for completing the interview. Of these 781 students, 139 indicated an interest in follow-up interview participation. In the initial round of recruitment, we attempted to reach the students through multiple avenues: (1) emails sent via SignUpGenius (SUG), a web-based tool for group planning and scheduling management; (2) invitations sent to email addresses; and (3) recruitment calls conducted using available phone numbers.

We used SignUpGenius to set up interview slots, which included Zoom virtual meeting platform links that allowed us to record and later transcribe each of the interviews. The 139 potential interviewees who volunteered to participate in an interview received an email inviting them to select a convenient day and time slot through SUG (with interviewer contact information assigned for each slot). Once a student responded affirmatively, the student and the assigned interviewer received a confirmation email. We then sent a reminder email to the student and interviewer a day before the scheduled interview. In some cases, interviewers sent text message reminders and/or made reminder calls to students the day of the interview, particularly for those students who missed previously scheduled appointments.

Ultimately, 28 students participated in the interviews through this original recruitment methodology. The project director then identified and contacted survey respondents who declined to be interviewed, but who met the eligibility requirements (still enrolled or actively

⁴ We did not actively recruit students for interview participation who said they had considered transfer at some point but had decided not to as they represented only a very small proportion of the survey sample.

planning to transfer, but not at the point of exiting) to increase the potential sample of students who were possibly still pursuing transfer. We then sent a SUG email to this new group of eligible students and conducted additional interviews, bringing the total to 39 completed interviews (see Table 2 below).

Table 2. Number and Percent of Interview Participants by Transfer Status

Transfer Status	n	%
Actively planning to transfer	29	74.4
Still deciding to transfer	8	20.5
Considered transfer at some point but decided not to ⁵	2	5.1
Total N	39	100.0

Interview Protocol

Similar to the questions posed in the survey, the interview questions started broad, but included more opportunities to ask follow-up questions and collect quotes that captured the students' stories, perspectives, and ideas. In general, interview questions centered around three core research questions:

1. How do **college-specific factors** (e.g., transfer culture/climate) help or hinder students' journeys through community college and to their transfer destination?
2. How do **student-specific factors** (e.g., personal life, financial status, familial role and expectations) help or hinder students' journeys through the community college and to their transfer destination?
3. How can **college policy and practice** evolve to create a climate and culture that better supports students' transfer success?

The research team developed an interview protocol to investigate the original college- and student-level factors for transfer decision-making and to drill deeper on key issues in the survey. These factors and issues included students' transfer motivators; the importance of the proximity to universities; the role of community college culture, resources, and personnel; and the role of factors external to the college (i.e., family, work responsibilities). Interviews also explored students' perceptions versus actual knowledge of various transfer challenges, resources, and supports.

The research team mapped key interview questions to the survey questions, and each researcher reviewed students' survey responses in advance of the interviews. By mapping the survey questions to the protocol questions, the researchers clarified and confirmed information students provided in their survey, such as their transfer goal, major, and transfer motivators.

⁵ While at the time of the survey these participants indicated that they were still deciding about their transfer goal, by the time of the interview (2-3 months later), they were no longer considering transfer.

The research team developed and deployed three versions of the protocol: (1) one for students who were still planning to transfer, (2) one for those who were actively transferring (had been accepted to and planned to enroll in a university for fall 2020), and (3) one for those who had decided not to transfer.

After each interview, researchers immediately captured key takeaways, recommendations, and suggestions from respondents as to how colleges could smooth students' transfer journeys. Researchers also noted insights and feedback respondents shared to help fellow students successfully transfer. The full interview protocol can be made available upon request.

Interview Data Analysis

Research team members audio-recorded each interview and transcribed it in order to quantify code-counts and pull direct quotes. Researchers transcribed all recordings using www.Temi.com and uploaded transcripts to Dedoose, an online qualitative analysis software. Two teams of researchers employed the same process to code the interviews by reviewing an assigned subset of the interviews and selecting text that was then coded by topic and theme. At the start of the coding process, two researchers coded a subset of all interviews to ensure common understanding and use of codes. After coding all interviews, the team reviewed the dominant (parent) and related sub-codes (child) codes, and merged codes where researchers noted similar themes. The team downloaded the excerpts from the codes with the largest counts into Excel, conducted a secondary analysis of these excerpts, summarized key themes, and highlighted nuances. The final summaries captured exemplary quotes, which the team then mapped to the survey findings to provide context for each of the factors identified in the Student Transfer Capacity-Building Framework.

Survey and Interview Results

The following section primarily details the findings from the student survey, and includes a high-level synopsis of interview results when relevant. *Students Speak Their Truth about Transfer: What They Need to Get Through the Gate* (Cooper et al., 2020) offers more information on the contextual and complementary results generated by the student interviews.

Demographics of Full Sample

We used descriptive statistics to determine if the sample of survey respondents and interview participants was representative of the study population. Table 3 (on p. 14) provides a demographic breakdown of four groups within the full sample of the survey as well as the interviewees:

- The entire study population ($N = 187,018$)

- The random sample of the entire study population selected to receive the survey ($n = 39,651$)
- All survey respondents ($n = 1,596$)
- Final survey sample (those who were actively planning to transfer, still deciding if they wanted to transfer, and who considered transfer at some point but decided not to) ($n = 809$)
- Subset of survey respondents who participated in interviews (interviewees) ($n = 39$)

Table 3 also shows that in examining where differences existed between the groups above:

- **Age:** Survey respondents and interviewees were younger than the entire study population.
- **Gender:** The final survey sample and interviewees were more likely to be female than the entire study population.
- **Race/Ethnicity:** There were no significant differences across the study population and survey and interview samples with respect to the proportion of racial/ethnic groups, except slightly more interviewees identified as two or more races.
- **Location:** There were no significant differences across the survey population and survey and interview samples in the proportion of students across the regions.
- **ATG/NTG Status:** As expected given the deliberate oversampling of ATG students, the final survey sample consisted of a significantly higher proportion of ATG students compared to the entire study population, and all interviewees were ATG students.
- **Enrolled vs. Exited:** The proportion of survey respondents and interviewees who were currently enrolled was significantly higher than in the other survey groups. This result is not surprising given that the survey piped out exited students who had already transferred.
- **Transfer Plans:** Most of the survey respondents and the majority of interviewees were actively planning to transfer. For survey respondents, nearly half of those students had transferred to a university by the time the survey was administered.

Table 3. Full Sample Demographics

	Entire Study Population (N = 187,018)		Randomly Selected Sample (n = 39,651)		All Survey Respondents (n = 1,596)		Final Survey Sample (n = 809)		Interview Sample (n = 39)	
	n	%	N	%	n	%	n	%	n	%
Age										
Younger (<26)	104,052	55.6	24,696	62.3	1,101	69.0	549	67.9	24	61.5
Older (>26)	82,909	44.3	14,943	37.7	495	31.0	260	32.1	15	38.5
Not Reported	57	<0.1	12	<0.1	0	0.0	0	0.0	0	0.0
Gender										
Female	104,869	56.1	21,764	54.9	957	60.0	499	61.7	19	48.7
Male	80,833	43.2	17,600	44.4	627	39.3	306	37.8	20	51.3
Not Reported	1,316	0.7	287	0.7	12	0.8	4	0.5	0	0.0
Race/Ethnicity										
Asian	32,815	17.6	7,357	18.6	287	18.0	121	15.0	6	15.4
Black/African American	9,095	4.9	1,583	4.0	68	4.3	26	3.2	2	5.1
Filipino	3,030	1.6	658	1.7	0	0.0	0	0.0	0	0.0
Hispanic	77,559	41.5	17,617	44.4	800	50.1	450	55.6	18	46.2
Native American	1,179	0.6	205	0.5	7	0.4	3	0.4	0	0.0
Pacific Islander	1,653	0.9	304	0.8	11	0.7	6	0.7	0	0.0
Two or More	9,178	4.9	1,904	4.8	73	4.6	44	5.4	7	18.0
White	48,933	26.2	9,462	23.9	332	20.8	152	18.8	6	15.4
Unknown	3,576	1.9	561	1.4	18	1.1	7	0.9	0	0.0
Region										
Central Valley (CV)	49,244	26.3	9,721	24.5	413	25.9	228	28.2	6	15.4
Inland Empire (IE)	33,848	18.1	6,686	16.9	267	16.7	113	14.0	9	23.1
All Other	103,926	55.6	23,244	58.6	915	57.4	468	57.9	24	61.5
Transfer Gate Status										
ATG	101,748	54.4	30,933	78.0	1,421	89.0	672	83.1	39	100.0
NTG	85,270	45.6	8,718	22.0	175	11.0	137	16.9	0	0.0
Fall 2018 Enrollment Status										
Enrolled	33,690	18.0	19,665	49.6	819	51.3	652	80.6	28	71.8
Exited	153,328	82.0	19,986	50.4	777	48.8	157	19.4	11	28.2
Transfer Plans										
Actively planning to transfer	-	-	-	-	614	38.5	614	75.9	29	74.4
Still deciding if I want to transfer	-	-	-	-	167	10.5	167	20.6	9	23.1
Considered transfer at some point but decided not to	-	-	-	-	28	1.8	28	3.5	1	2.6
Already transferred and enrolled in a university	-	-	-	-	766	48.0	0	0.0	0	0.0
Never intended to transfer	-	-	-	-	21	1.3	0	0.0	0	0.0

Key Characteristics of Final Survey Sample

From this point on, when discussing survey findings, we focus on the results for the final sample of 809 survey respondents (referred to herein as survey respondents).

Note that when presenting the following survey results, we generally highlight findings for the overall survey sample. In some cases, results are parsed out for enrolled relative to exited students to determine whether significant differences exist between these two groups and to inform practitioners on targeted interventions that may help keep students enrolled. *Transfer Stories and Strategies: How Six Student Groups Experience the Transfer Journey* will offer a specific summary of the key demographic differences in how students experience each of the four factors in the Student Transfer Capacity-Building Framework.

Tables 4 and 5 below and on the next page provide additional information about survey respondents' characteristics. Table 4 shows that the majority of students live with their parents. As it relates to finances, Table 5 shows that nearly one-third of survey respondents provide financial support for someone other than themselves, and one-quarter work full time. Students were asked to identify what percentage of their community college education is funded from various sources. While survey respondents reported funding nearly half of their community college education through financial aid, they also indicated paying for nearly one-third with their own income.

Table 4. Current Living Situation

Current Living Situation (n = 701 ⁶)	%
I live with my parent(s)	62.1
I live with my spouse	16.8
I live with my children	12.5
I live with my spouse and/or domestic partner	11.5
I live on my own	8.3
I live with other relatives	7.3
I live with one or more roommates who are not related to me	5.5

Note: Respondents could check all that apply

⁶ N-counts vary across tables as participants could choose to skip questions.

Table 5. Financial and Employment Status

Financial Support to Others (n=701)		%
I provide financial support for someone other than myself		32.4
I do not provide financial support for someone other than myself		67.6
Hours Worked Per Week (n=701)		
I do not have a paying job		23.9
1-5 hours		3.5
6-10 hours		7.0
11-20 hours		23.8
21-30 hours		16.5
More than 30 hours		25.4
How Students Pay for Their Community College Education (proportion funded by source) (n=704)		
Financial aid (e.g., loans, scholarships, or grants)		45.9
Your own income		29.9
Money from your parents or family		15.9
Your own savings		6.5
Other		2.8
Employer support		1.0

Table 6 shows that when asked about their primary educational goal, more than half of survey respondents indicated they entered their community college with a goal of transfer (with almost a quarter listing the goal of obtaining an associate degree). Notably, students' educational goals appear to evolve in favor of transfer while attending a community college; at the time of survey completion, roughly three-quarters listed transfer as their primary goal (with very few still listing obtaining an associate's degree as their primary goal).

Table 6. Educational Goals When Entering Community College and at Present

Educational Goal	Original	Current
	Primary Ed Goal When Entering Community College (n = 797)	Primary Ed Goal at Time of Survey (n = 796)
	%	%
Complete a certificate program	5.7	3.5
Explore new career options or obtain/update job-related skills	3.1	6.2
Explore self-improvement, personal interests	3.3	2.6
Obtain an associate degree	22.5	9.8
Transfer to a university	57.8	74.5
Undecided on goal	7.7	3.4

Motivators and Challenges to Transfer for Survey Respondents and Interviewees

The survey asked respondents to indicate how much each of a variety of factors act as motivators to transfer; answer options included very motivating, moderately motivating, and not at all motivating. Table 7 shows:

- The large majority of survey respondents were motivated by the potential to earn a bachelor's degree to increase their career options.
- Earning a bachelor's degree to make more money was also a substantial motivator.
- Knowing most of their friends were transferring was not an especially salient factor.
- Exited (versus enrolled) students were significantly less likely to be motivated to transfer by:
 - Earning a bachelor's degree to increase their career options
 - Having confidence that they could be successful as a transfer student
 - Having good grades in their community college classes
 - Having encouragement from their family

Table 7. Transfer Motivators for Survey Respondents (% indicating very motivating)

Factor	Transfer Motivator	% All N = 808	% Enrolled n = 652	% Exited n = 156
	Earning a bachelor's degree to increase my career options	92.4	93.5*	87.8*
	Earning a bachelor's degree to make more money	85.9	85.6	87.2
	Getting enough financial aid to pay for my education	81.9	82.5	79.5
	Having confidence that I can be successful as a transfer student	79.5	82.0*	69.0*
	Having good grades in my community college classes	72.0	74.9*	58.1*
	Having encouragement from my family	71.9	73.8*	63.9*
	Having support from my community college	66.5	67.0	64.1
	Having universities I can attend near my home	61.3	59.7	68.0
	Knowing most of my friends are transferring	39.4	40.7	34.0

*Statistically significant difference between enrolled and exited students ($p < .05$)



STUDENT INTERVIEWEE HIGHLIGHTS: TRANSFER MOTIVATORS

Paralleling survey findings, interviewees most often mentioned the motivating power of the increased career options and earning potential that comes with transferring and obtaining a bachelor's degree. Interviewees additionally expressed a number of internal motivators such as:

- Being driven by an inner motivation to prove to themselves, family, and friends that they are capable of achieving this goal and seeking to make others proud
- Seeing others that they themselves admired in more advanced roles
- Having someone believe in them, be it a professor, counselor, or mentor

Conversely, the survey also asked respondents to assess challenges—both current challenges (Table 8a) and those they *anticipated* they would face were they to transfer (Table 8b). Answer options included very challenging, moderately challenging, and not at all challenging.

In considering *current* challenges:

- Respondents were more likely to *anticipate* challenges to transfer than to name existing factors as challenges to transfer.
- Less than one-third of respondents found existing issues (e.g., concerns about community college grades) to be very challenging.
- Exited students were significantly more likely than enrolled students to identify the absence of universities they could attend near home as very challenging and to note a lack of support from their community college.

When considering *anticipated* challenges:

- Over three-quarters of respondents anticipated that the cost of university tuition would be very challenging, and nearly two-thirds anticipated that the cost of living expenses while attending university would be very challenging.
- Over half of respondents anticipated balancing school and work responsibilities would be challenging.
- A large majority of respondents did not anticipate that making friends or having too little encouragement from their family would be a significant challenge.

Table 8a. Current Challenges to Transfer for Survey Respondents (% indicating very challenging)

Factor	Current Challenge	% All N = 806	% Enrolled n = 650	% Exited n = 156
	Concerns about my ability to be a successful transfer student	32.9	32.9	33.1
	Concerns about my grades from my community college classes	32.6	33.5	28.2
	Absence of universities I can attend near my home	22.9	21.4*	29.0*
	Lack of support from my community college	16.8	15.4*	22.4*
	Lack of encouragement from my family	16.0	15.3	18.8
	Lack of friends who are transferring	8.8	8.6	9.7

*Statistically significant difference between enrolled and exited students ($p < .05$)

Table 8b. Anticipated Transfer Challenges for Survey Respondents (% indicating very challenging)

Factor	Anticipated Transfer Challenge	% All N = 807	% Enrolled n = 652	% Exited n = 155
	Cost of university tuition	75.3	75.1	76.3
	Cost of living expenses while attending university	66.1	66.7	63.2
	Balancing school and <i>work</i> responsibilities	58.4	59.0	56.1
	Balancing school and <i>family</i> responsibilities	42.1	41.2	46.1
	Too little support from the university	25.2	24.8	27.1
	Transportation to and from campus	22.8	23.3	20.7
	Too little encouragement from my family	13.8	13.4	15.6
	Issues making friends	13.0	13.9	9.1

Note: None of the differences between enrolled and exited students were statistically significant



STUDENT INTERVIEWEE HIGHLIGHTS: TRANSFER CHALLENGES

In alignment with the survey results, **finances immediately came to mind for interviewees when discussing obstacles to transfer**. When talking about financing their education, these students generally knew college is expensive; however, the majority was uncertain about the cost of their *current* education and how it was being covered, let alone what the cost of attending a university might be. Most did not know how they would pay for tuition post-transfer, nor what financial supports are available. Some were tapping a range of sources including coworkers, family, friends, and university websites to learn more about the financial implications of transfer and how to fund university expenses through financial aid, scholarships, grants, and loans.

They also named administrative hurdles that impacted their ability to pay for tuition, chiefly family finances impacting their ability to get aid, even in instances when their family did not support students' education, and issues with (Free Application for Federal Student Aid) FAFSA disqualification due to the timeframe needed for degree completion. In addition to the overarching obstacle of paying for college and the often cited challenge of needing to balance work to pay for college with college itself, interviewees highlighted the obstacles presented by financial costs not directly related to tuition, such as housing and books.

Student interviewees also noted that a lack of knowledge about university expectations related to course rigor, environment, and culture led them to anticipate challenges post-transfer. Interviewees expressed doubts as to whether they would be academically and mentally prepared to handle university courses; whether university culture would be welcoming to and supportive of transfer students; and whether they would be able to successfully juggle college, work, and family responsibilities given the expected inflexibility in university course scheduling coupled with the need to work.

The survey asked participants to rate their level of agreement with statements about themselves and situations that may facilitate or hinder transfer. Table 9 provides mean levels of agreement on a scale from 5 (strongly agree) to 1 (strongly disagree) and shows:

- Respondents were most likely to agree that there are more than a few university options near them within driving distance, though agreement was also high that students were able to move in order to attend a university.
- Respondents were least likely to agree that family barriers precluded them from transfer.
- In general, exited students were significantly more likely than enrolled students to cite issues related to university access and familial pressures. For example:

- Exited students were significantly more likely than enrolled students to agree that the top priority in choosing a university is how close it is to their home, and that they feel pressure to prioritize supporting their family over pursuing their education.
- Conversely, enrolled students were significantly more likely than exited students to agree that they have more than a few universities near them within driving distance, and that they are able to move in order to attend a university.

Table 9. Survey Respondents Level of Agreement with Statements Regarding Personal Factors Impacting Transfer

Factor	Personal Factors That Impact Transfer	Avg All N = 784	Avg Enrolled n = 636	Avg Exited n = 148
	There are more than a few universities near me within driving distance	3.5	3.5*	3.2*
	My top priority in choosing a university is how close it is to my home	3.3	3.3*	3.6*
	I am able to move in order to attend a university	3.2	3.3*	2.7*
	Most of the people I grew up with never attended a university	3.0	3.0	3.0
	I have a sibling or close family member who transferred and got their bachelor's degree	2.9	2.9	2.9
	I feel pressure to prioritize supporting my family over pursuing my education	2.7	2.6*	3.2*
	My family would be upset if I moved away to attend a university	2.4	2.4*	2.6*
	I don't think I can get into the universities in my area	2.4	2.3*	2.7*
	I have close family who transferred but never got their bachelor's degree	2.4	2.3*	2.6*
	I don't really have any university options in my area	2.3	2.3*	2.6*

Note: 5=Strongly Agree; 1=Strongly Disagree

*Statistically significant difference between enrolled and exited students ($p < .05$)



STUDENT INTERVIEWEE HIGHLIGHTS: PERSONAL FACTORS THAT IMPACT TRANSFER

When exploring personal factors impacting students' transfer experience, some interviewees noted the need and the desire to transfer to a university near their current home, which is in alignment with survey responses. For some students, having one or more universities nearby was a key transfer motivator allowing them to maintain their current housing, and a short commute would allow more time for studying and balancing work, family, and school demands.

Interviewees cited other personal situations as barriers to transfer success, including a lack of family support broadly. However, others reported more discrete personal situations, such as the need to care for others, including children as well as other family members. Further, a small handful of interviewees discussed acute and chronic physical issues impeding course completion, as well as mental health issues delaying time to degree completion or provoking concerns about the ability to do well upon transfer.

Navigating Transfer: Use of Transfer-Related Resources

Navigating transfer often requires seeking information from a variety of sources. Table 10 shows that when asked with whom students discuss transfer:

- Nearly two-thirds indicated talking about their transfer plans with parents, siblings, or other close relatives.
- Nearly half indicated discussing transfer plans with friends at the community college.
- Fewer students indicated talking to community college counselors or professors.
- Enrolled students were significantly more likely than exited students to indicate talking to various other people about transfer across multiple option including parents, siblings, or other close relatives; community college friends; counselors; and professors.

Table 10. With Whom Survey Respondents Discuss Transfer

Factor	With Whom Students Discuss Transfer	% All N = 777	% Enrolled n = 632	% Exited n = 145
	Parents, siblings, or other close relatives	63.4	66.1*	52.2*
	Community college friends	48.3	52.6*	30.6*
	My community college counselor	37.6	41.1*	22.9*
	Friends outside of my community college	35.9	37.4	29.3
	My community college professors	23.2	24.7*	17.2*
	My work colleagues	22.1	21.5	24.8

*Statistically significant difference between enrolled and exited students ($p < .05$)

In addition to speaking to others about transfer, survey respondents provide insights into the various transfer-related resources they leveraged and the helpfulness of such resources. Table 11a indicates the proportion of students who both used and found various transfer-focused resources helpful. Conversely, Table 11b indicates the proportion of students who either did not use or did not know about a given transfer-focused resource. Tables 11a and 11b show:

- Approximately three out of every four students indicated the helpfulness of counseling sessions focused on transfer, online resources such as the [ASSIST.org](https://assist.org/)⁷ student transfer information site, and their community college's transfer center.
- Over half indicated that they either did not use or did not know about university tours organized by their community college; a college club, group, or honors society; community-based organizations; or college honors programs when it came to seeking out transfer-related resources. Note that not all of these resources are necessarily offered at each college; therefore, the lack of use may represent a lack of availability rather than a disinterest in using that resource.
- Enrolled students were significantly more likely than exited students to indicate that they both used and found helpful the majority of transfer-related resources.

⁷ This web-based platform is the “official transfer and articulation system for California’s public colleges and universities,” allowing students to identify specific transfer pathways and requirements between their community college(s) and the UC and CSU. For more information, visit <https://assist.org/>.

Table 11a. Percent of Survey Respondents Who Used and Found Transfer Resources Helpful

Factor	Transfer Resources Used and Found Helpful	% All N = 637	% Enrolled n = 529	% Exited n = 108
	Counseling session(s) focused on transferring	76.6	79.1*	65.2*
	Online resources (e.g., ASSIST, UC TAP, university websites)	72.4	74.4*	63.5*
	My community college's Transfer Center (transfer resource office)	71.2	73.5*	61.2*
	Guidance from a community college professor	66.9	68.6*	59.4*
	University representatives visiting your community college	57.5	60.2*	45.7*
	My college's Transfer Center website	56.7	58.8*	47.1*
	Transfer preparation workshops at my community college	54.9	57.1*	44.9*
	Transfer centers on the university campuses	50.1	51.6	43.5
	Special programs (e.g., EOPS, MESA, Umoja, TRiO)	49.5	51.1	42.8
	University tours organized by your community college	45.7	47.8*	36.2*
	A college club, group, or honors society	40.2	41.4	30.5
	Community-based organizations (e.g., College Track, Boys and Girls Club)	36.6	37.0	35.0
	College honors program	34.6	35.3	31.4

*Statistically significant difference between enrolled and exited students ($p < .05$)

Table 11b. Percent of Survey Respondents Who Did Not Know About or Did Not Use Transfer Resources

Factor	Transfer Resources Not Known About or Used	% All N = 637	% Enrolled n = 529	% Exited n = 108
	Counseling session(s) focused on transferring	15.6	14.3*	21.7*
	Online resources (e.g., ASSIST, UC TAP, university websites)	24.4	22.6*	32.1*
	My community college's Transfer Center (transfer resource office)	24.3	22.6*	31.6*
	Guidance from a community college professor	25.8	24.1*	33.3*
	University representatives visiting your community college	37.3	35.4*	45.7*
	My college's Transfer Center website	36.3	33.9*	47.1*
	Transfer preparation workshops at my community college	39.8	37.9*	48.6*
	Transfer centers on the university campuses	46.4	45.4	50.7
	Special programs (e.g., EOPS, MESA, Umoja, TRiO)	47.2	45.5	54.4
	University tours organized by your community college	50.3	48.0*	60.9*
	A college club, group, or honors society	53.2	52.1	58.4
	Community-based organizations (e.g., College Track, Boys and Girls Club)	57.4	56.5	61.3
	College honors program	60.1	59.4	62.8

*Statistically significant difference between enrolled and exited students ($p < .05$)



STUDENT INTERVIEWEE HIGHLIGHTS: USE OF TRANSFER-RELATED RESOURCES

Much like survey respondents, student interviewees most frequently mentioned transfer centers, counselors, online resources, and faculty as their primary sources for transfer information, providing additional nuance into how they experience these resources.

Transfer Centers (TCs): Not surprisingly, interviewees most commonly cited TCs as the place they turned to for information about transferring. While (non-transfer specific) counselors appear to be the first stop in students' transfer journey, they reported being referred to the TC as they got closer to the transfer gate. Interviewees discussed using the TC in a number of ways, primarily tapping transfer counselors and securing information about transfer requirements. Some students noted a high level of visibility of the TC at their college, as evidenced by centrally locating it on campus and aggressively marketing its presence and its sponsored events (via emails, flyers, etc.). Across the interviews, students typically associated a strong TC presence with a strong transfer culture at the school more broadly, with schools hosting college expos and regular transfer workshops and incentivizing TC use.

Counselors: Student interviewees universally noted the impact of counselors in their transfer experience—both positive and negative. Students sought counselor input for functional reasons such as reviewing their current academic schedule and education planning, confirming (or denying) transfer-related information, and reviewing university admission applications. Through these experiences, students described these counselor interactions as either (a) compartmentalized or (b) holistic. Counselors portrayed as compartmentalized were often seen by students as task-oriented and approaching their position as a job, rather than a profession. Conversely, interviewees described holistic counselors as sincere and approachable, authentic, able to build rapport and think about the “big picture,” and that these counselors “went the extra mile.”

Importantly, some students believed that ineffective counseling hindered their transfer journey. Students described receiving misguided advice, interfacing with counselors who lacked empathy, seeing numerous counselors at one college, and being unable to see counselors due to a lack of appointment slots. Students asserted that mandated versus optional appointments are critical to student success, and that designated counselors in programs such as Disabled Students' Programs and Services (DSPS), Extended Opportunity Programs and Services (EOPS), and Mathematics, Engineering, Science Achievement (MESA) serve students more effectively.

Online Resources: Many students relied on a suite of online resources to get information about what to study, how to transfer, where to transfer, what the requirements were, which classes to take based on major and transfer destination, how to check if they were taking the “right classes,” how far along they were, what university tuition would cost and how to secure financial assistance, and what other transfer students' experiences were once enrolled in a university. Some used these online resources exclusively without

STUDENT INTERVIEWEE HIGHLIGHTS CONTINUED: USE OF TRANSFER-RELATED RESOURCES

seeing anyone at the community college, while others corroborated the online information with a counselor on campus. In some cases, students also checked online resources to verify what they had heard from campus counselors. The most popular online transfer information source was ASSIST.org, followed by university and community college websites, as well various online forums and websites (e.g., Reddit, Google Search, YouTube).

Instructional Faculty: Although student interviewees described getting transfer support from professors less frequently than the other sources noted above, they did note the positive impact that instructors can make on their transfer experience. Professors who left marked impressions on students welcomed them to their offices; shared personal stories of success and failure; asked thoughtful questions; offered poignant advice; were patient, honest, approachable, and accessible; and remembered students' names outside of class. Students explained that particularly helpful faculty members discussed transfer seriously with them; showed them published roadmaps and articulation agreements; promoted undergraduate research opportunities; supported engagement in co-curricular activities; and helped students understand university rigor and goal setting by offering a challenging course curriculum.

Finally, it is important to note that regardless of the source, student interviewees discussed the impact of having misinformation about transfer processes and requirements, which ultimately has both financial and persistence implications. A number of interviewees reported following the incorrect transfer path for their desired major/area of study, or taking many more credits than necessary, only to learn those credits could not be used to facilitate transfer.

Student Advice for Improving College Transfer Policies and Practices

Finally, we concluded interviews by asking students to offer their college advice on how to help more students decide to transfer and make good, timely progress towards this milestone. Interviewees offered a myriad of ideas, summarized below and grouped by recommendation type (note that advice often related to multiple factors, as identified by the associated icons below). These suggestions served as a basis for the “Areas of Opportunity” related to each factor offered in *Students Speak Their Truth about Transfer: What They Need to Get Through the Gate* (Cooper et al., 2020) and provide colleges a launchpad for identifying ways to improve the student transfer experience.



Proactive Outreach and Support

- Educate high school students about the value of attending community college as part of a transfer path and the long-term value of a bachelor's degree (versus the short-term value of taking a job out of high school without a career path)
- Promote a sense of pride and positive identity about *choosing* the community college route to a bachelor's degree
- Integrate career growth and opportunity information into educational and transfer planning, and ensure students know the type of employment they can secure with a bachelor's degree in their area of study
- Ensure consistent and accurate information is provided to students by different counseling and advising professionals
- Foster broader campus responsibility for providing transfer support and information across all administrators, faculty, and classified professionals
- For groups of students who are still deciding whether or not to transfer, do more proactive nudging and outreach
- Hold transfer-specific orientations at the beginning of each semester
- Identify and outreach to students who are approaching their financial aid cap yet have not seen a counselor
- Structure person-to-person support that allows students to develop a relationship with an individual who can provide personalized guidance and encouragement; consider faculty advisors, peer mentors (recent community college graduates), transfer counselors, general counselors
- Amplify exposure to transfer via peers who have successfully transferred, university admission representatives, and transfer center resources and activities
- Develop structured cohorts or peer support groups for students who are committed to a transfer goal; provide a space for them to problem solve together, provide each other support, feel a sense of belonging, and receive just-in-time information and support



Transfer Maps

- Help students see clear map from entry to transfer, including all courses and requirements for different types of transfer destinations
- Develop a way for students to see in which majors they can transfer based on the courses they have already completed



Technology Solutions

- Consider using a Zoom-like tool to offer counseling
- Set up online and/or group appointments on key topics; for example, Zoom call or group counseling session with up to 10 students on selecting a meta-major
- Create an app with real-time transfer information, guidance, and advice



Program/Classroom Approaches

- Embed work-based learning in introductory courses to provide students a clear and practical understanding of the work associated with their program/major
- Provide transfer advising by program, major, and/or pathway



Partnerships with Local CSU/UC

- Increase university presence on community college campus; hold more transfer days, workshops, info sessions, etc.
- Promote transfer days and visits and incentivize student participation
- Determine how to smooth transitions between institutions with a focus on helping students know what to expect and how to plan for differences at the university related to course rigor; costs and expenses; financial aid, grants, scholarships, and other financing options; and campus life



Financial Literacy/Paying for College

- Make transferring seem more affordable by helping students understand the true cost of attending university and/or how to research that information in a comprehensive way (tuition, living expenses, etc.); “sticker shock” can cause students to be afraid that they cannot afford attending a university and many may not apply as a result
- Provide workshops and guided support on how to complete scholarship and grant applications, including walking through the process from start to finish, helping students know what to write about in the applications, and understanding the options available to them
- Offer workshops that walk students through financial aid award letters and help them identify other sources of funding besides state and federal grants

Limitations

Survey Limitations

In fall 2018, we asked colleges to submit files for ATG and NTG students between spring 2013 and spring 2018. We subsequently surveyed students as of spring 2019. Of those students who responded, nearly half had actually already transferred. This result was likely predominately due to the delay in receiving information from the National Student Clearinghouse about student transfer. There is typically a semester-long lag between when students transfer and when that information becomes available.

Further, left unknown is whether any fundamental differences exist between those willing to participate in a survey and those who would not. The overall demographic characteristics of the final survey sample differed somewhat from the study population (notably slightly younger and more likely to be female as is the case with many voluntary surveys). We cannot know the degree to which that difference may have influenced results.

Additionally, the survey developed for this project consisted of 41 questions in an attempt to capture all potential factors and parse out which factors were more versus less salient to students transfer capacity. While comprehensive in nature, we recognize that long surveys can result in lower than desired response rates, especially for survey questions that come towards the latter half of the survey.

Now that we have identified the four core factors for building students' transfer capacity, we would advocate that colleges doing this type of research do so with a more streamlined version of the survey. As such, a full copy of the survey is not included in the appendix (but can be made available upon request by contacting research@rpgroup.org). An updated survey directly aligned to the factors, leveraging a few key questions per factor, will allow colleges to capture data on each factor more wholly and succinctly.

Interview Limitations

Despite a high-touch approach, we found outreach challenging and participation lower than hoped and anticipated. We originally intended to connect with a higher proportion of exited students, but their lower response led to a shift in focus to currently enrolled students. Similar to the survey sample, we found that many students were making the transition to university by the time we connected with them between their survey response (April-May 2019) and interview time (July-August 2019). At the same time, given the timing of the interviews, their transfer experience and the factors impacting their decision-making were fresh in mind, and they were able to further identify anticipated concerns about university readiness as they were crossing through the transfer gate.

Conclusions

While our original methodology outlined a series of student- and college-level variables for transfer decision-making that were quite distinct from one another, it became readily apparent through our Phase 2 research that four complex and intersecting factors—university affordability, school-life balance, transfer navigation, and support networks—impacted students' perceived and actual readiness for university. Further, the research showed that these factors in our newly developed Student Transfer Capacity-Building Framework were deeply interconnected (as shown in Figure 1, p. 5).

Each of these factors have implications for the individual student as well as the college, and still further, university and intersegmental partners. Meaningfully addressing all four factors in a comprehensive and coherent way will require an all-hands effort—from campus-based culture and practice, all the way up to system-level policy, as well as considerations by segment and across segments.

For a comprehensive synthesis, please read both *Students Speak Their Truth about Transfer: What They Need to Get Through the Gate* (Cooper et al., 2020), as well as *Transfer Stories and Strategies: How Six Student Groups Experience the Transfer Journey*. For more information on the first phase of this work that identified factors influencing the likelihood that students would reach the transfer gate, see *Transfer Odds: Examining Factors Determining Whether Students Transfer or Get Stuck Near or At the Gate* (Cooper et al., 2019).

Appendix A: Original Taxonomy of Factors for Students' Transfer Decision-Making

Prior to conducting the Phase 2 student surveys and interviews, the Through the Gate research team identified a taxonomy of student- and college-level factors through an extensive review of existing literature and in alignment with current findings on community college transfer, student success, and equity, as well as based on our Phase 1 findings. These original factors are outlined in the figure below.

Table A1. Original Taxonomy of Student- and College-Level Factors

*Factors that drive student transfer decisions, including those about the individual student and those about the college the student attends**

Student Factors	College Factors
<input type="checkbox"/> Academic (e.g., GPA, transfer units completed)	<input type="checkbox"/> Transfer Support (e.g., robustness of Transfer Center)
<input type="checkbox"/> Demographics (e.g., gender, race/ethnicity)	<input type="checkbox"/> Culture (e.g., intersegmental alignment, messaging)
<input type="checkbox"/> Psychological (e.g., confidence, fear of unknown)	<input type="checkbox"/> Policy (e.g., # of ADTs available)
<input type="checkbox"/> Sociocultural (e.g., family expectations)	<input type="checkbox"/> Regional (e.g., proximity to university, population density)
<input type="checkbox"/> Financial (e.g., college affordability)	

*Developed by the RP Group based on a review of existing literature and Through the Gate's Phase 1 findings; examining influence of factors through student surveys and interviews in Phase 2.



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■ ■ ■ *Through the Gate* Transfer Study Overview

The RP Group's *Through the Gate* transfer study aims to identify strategies for increasing transfer among "high-leverage" learners—students who complete all or most of their transfer requirements but do not make it to university. The study includes:

Phase 1: Mapping the Transfer Landscape (2016 – 2018)

Quantitative research to understand the transfer landscape, determining: (1) how many students in California arrived at the transfer gate, but did not go through, and (2) who they are and where they reside

Phase 2: Getting Better Directions (2019)

Quantitative and qualitative research with students who are close to transfer to understand what factors impact their journey and how policy and practice might change to propel them through the transfer gate

Phase 3: Engaging for Action (2020)

Convenings with CCC, CSU, and UC leaders, educators, researchers, and advocacy groups to identify strategic opportunities to strengthen transfer success based on findings

The RP Group is conducting this research with generous support from the College Futures Foundation.

The Research and Planning Group for California Community Colleges

The RP Group strengthens the ability of California community colleges to discover and undertake high-quality research, planning, and assessments that improve evidence-based decision-making, institutional effectiveness, and success for all students.

Project Team

Darla M. Cooper, EdD, Project Co-Director

Andrew Kretz, PhD

Alyssa Nguyen, MA, Project Co-Director

Kay Nguyen, EdD

Katie Brohawn, PhD

Rogéair D. Purnell, PhD

Priyadarshini Chaplot, MBA

Diane Rodriguez-Kiino, PhD

Kelley Karandjeff, EdM

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Through the Gate Transfer Study
The Research and Planning Group for
California Community Colleges
research@rpgroup.org
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